

## Chapter 10 WSDOT Travel Rules and Procedures

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#### **Overview**

This Quick Reference Guide is a summary of the travel rules and procedures. For further details refer to the travel chapter section referenced.

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#### **Your Travel Coordinator**

To obtain a basic understanding of your organization's travel processing requirements, contact your organization's assigned Travel Coordinator. Ask your supervisor for their name and phone number.

This understanding will aid you in coordinating your trip arrangements (airline, rental car, lodging, etc.). Your Travel Coordinator also has access to department experts on specific travel questions and concerns.

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#### **Official State Business**

Official travel to carry out the mission and functions of the department is necessary and important. State and Federal laws, Office of Financial Management regulations, and the Secretary of Transportation and Chief of Staff regulate travel.

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#### **Equitable Treatment**

All travelers in like travel circumstances will receive the same treatment.

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#### **Types of Travel**

There are three main types of travel:

- In-state
- Out-of-state
- Out-of-country

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#### Prior Authorization

The traveler is responsible for obtaining authorization to travel from the appropriate authority prior to departing on the trip and for completing the appropriate travel forms. Questions should be referred to the organization travel coordinator. Refer to Subsection 10-2.10 for additional information.

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#### Authorization Criteria

The approving authority applies the following criteria:

- First, it must be demonstrated that the travel option being requested is the most economical to the department. A memo from the approving authority, which compares travel options, or includes a cost benefit analysis, may be used for this purpose.
- Second, consideration is given to that which is the most advantageous to any individual with special circumstances. OFM has defined that compliance with the Americans with Disability Act is advantageous to the state. Refer to Subsection 10-2.3 for additional information.

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#### Travel Status

As a traveler, you will be in travel status when you are away from both your official station and official residence. Normally this is outside the town, city, or vicinity limits of where you work and live.

For example, if you live in town or city 'A' and work in town or city 'B' when you are away for both these locations, then you are in travel status.

Being in travel status does not mean you are entitled to receive per diem. To qualify for per diem reimbursement, other criteria must be applied. However, you must first be in travel status, before the other travel principles apply.

Before estimated travel costs can be determined, the traveler must identify their assigned work shift and then apply the remaining travel principles. This includes the three-hour rule, which determines if the traveler is reimbursed for meals. Refer to Subsection 10-2.5 for additional information.

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#### Work Shift

A “work shift” means the hours you are normally scheduled to perform your job functions. On a daily basis this is the time you normally start and stop your workday. Often this is based on a 40-hour workweek. Some alternate work schedules are based on working 80 to 88 hours over a two-week period.

The daily work shift provides the basis for determining meal eligibility (subsistence) entitlements as described below.

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#### Per Diem Rates

Per Diem Rates are the maximum allowable amounts the department can reimburse you for lodging (before taxes), and for meals. The per diem rates are published by OFM, and based on the Federal per diem rates.

There are two cost rates used for Per Diem Rates: Non-High Cost, and High Cost. This information is available on line through an internet link on the Headquarters’ Accounting Services Office Web Site:

- <http://wwwi.wsdot.wa.gov/fasc/accounting/new-travel.htm>

Employees are expected to NOT purposely delay their departure or return in order to qualify for unnecessary meal costs. Refer to Appendix D for additional information.

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#### Meals

The amount you will be reimbursed for meals while traveling is called an “entitlement”. This is a set amount you receive for each meal you are entitled to while in travel status after meeting specific criteria:

- **The Three (3) Hour Rule** (refer to Subsection 10-3.3 for additional information) is used to determine whether you are entitled to meal reimbursement.
- You are not entitled to reimbursement for meals at or between your official station and/or official residence.
- Meal times are determined using a department meal period schedule. Meal periods are considered to be at the same time each day based upon your regular scheduled work shift. Meal periods for days off are the same as days worked.

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#### Meals (continued)

Meal entitlements that are reimbursed will not exceed the state allowance rate in effect for the location at the time of travel. Meal entitlements may be taxable depending on whether the travel is non-overnight, same day (taxable), or overnight (non-taxable). Refer to 10-3 for additional information. Meal allowances for "Overnight Travel" are based on where the traveler slept. For "Same Day Travel", it is based on the last temporary duty station of the day.

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#### Lodging

The amount you will be reimbursed for lodging expenses is not to exceed the state rate in effect at the time of travel. The following criteria affects your reimbursement:

##### Fifty Mile Rule

To be eligible for lodging reimbursement, your temporary duty station (travel destination) must be more than 50 miles from both your official station and your residence, using the most direct route. The fifty-mile rule is used to determine whether lodging will be part of your travel plans. Refer to 10-4.4 for additional information.

##### Exceptions to 50 Mile Rule

OFM has published three exceptions to the 50 Mile rule:

1. The official state business requires the traveler to arrive early in the morning or late at night for back-to-back events. The amount of time between close of business on the first day and the start of business on the second day must be 11 hours or less (based on 3 hours personal time and 8 hours of sleep).
2. The health and safety of the traveler will be compromised.
3. It is more economical to the state.

An additional exception: The Secretary of Transportation may determine that, during an emergency situation, employees performing critical department functions must remain at their work stations, and are therefore eligible for lodging. Refer to Subsection 10-2.7 for additional information.

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#### Lodging (continued)

##### **Exceptions to Maximum Lodging Rates (also known as the 150% Rule)**

There are six exceptions to the maximum lodging rates. Refer to Subsection 10-4.4, and Appendix Q, *Travel Expense Reimbursement Checklist*, for additional information on these exceptions.

##### **Exception for Very Unusual Conditions (also known as the Actual Cost Exception)**

Under certain conditions you can obtain approval for reimbursement of actual lodging expenses in excess of the 150% rule. When this exception is used you must:

- Obtain written approval from the approving authority by providing a brief explanation why the exception is necessary.
- Select the most economical room rate available under the circumstances.
- Include with your request for travel reimbursement a brief explanation, and signed approval, of the exception

Refer to Subsection 10-4.5 for additional information on this exception.

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#### Use of Privately Owned Vehicle (POV)

When you use your privately owned vehicle for state travel, you may be reimbursed based at the state rate per mile in effect at the time of travel. Miles off your commute route are eligible for reimbursement.

The POV mileage rate is available on line through an internet link on the Headquarters' Accounting Services Office Web Site

- <http://wwwi.wsdot.wa.gov/fasc/accounting/new-travel.htm>

The mileage you claim must be based on any of the following methods and the method used must noted on the Travel Expense Voucher:

- Point to point map miles -  
based on the state highway map produced by WSDOT.  
Map quest or similar Internet mileage guide (copy of printout attached to voucher).
- Odometer readings with beginning and ending mileage indicated on the Travel Expense Voucher.
- Trip meter to record the actual miles driven.

Refer to Subsection 10-5.2 for additional information.

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#### Miscellaneous Expenses

Miscellaneous travel expenses essential to the transaction of official state business may be reimbursable. You are responsible for understanding the types of expenses eligible for reimbursement and the criteria that must be met before reimbursement. Attach receipts when applicable to the Travel Expense Voucher.

An example: In general, taxi fares and parking are reimbursable when incurred to accomplish the business objective. These same expenses are not reimbursable if incurred for entertainment purposes while you are in travel status.

Refer to Subsection 10-6.2 for additional information.

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#### Checklist

For the basics on Travel Expense Voucher preparation, and additional travel information and forms, refer to Appendix Q, the Travel Expense Reimbursement Checklist.

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#### Travel Expense Voucher Tips

Review this list to help avoid common mistakes on the Travel Expense Voucher:

- Identify yourself.
- List the business purpose and clearly identify the specifics about where you are going, for what purpose, and any unusual circumstances or exceptions.
- Make sure totals are correct.
- Make sure account coding is correct.
- Obtain your supervisor's approval.
- Work with your Travel Coordinator to ensure compliance with travel rules.

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*End.*